



Office of Human Capital

Customer Service Training

11/25/2008

WELCOME



“Providing superior customer service is the single most cost effective way to differentiate your organization from the competition”

11/25/2008

We Are A Service Organization!



CUSTOMER SERVICE

CUSTOMER SERVICE



11/25/2008

3rd Quarter 2001	3rd Quarter 2000	2nd Quarter 2001	Nine Months 2001	Nine Months 2000
Revenues \$43,641	\$59,338	\$50,789	\$152,499	\$183,706*
Expenses 43,018	55,467	47,979	144,918	166,224*
After-Tax Profit/Loss 405	2,516	1,832	4,927	11,362*
After-Tax Annualized Return on Capital 1.1%	7.3%	5.0%	4.5%	11.4%
Assets** 2,680,452	2,342,225	2,562,618	2,680,452*	2,342,225
Capital & Subordinations 150,319*	139,721	146,179	150,319*	139,721
Commission Revenues 6,062	7,415	6,668	20,115	25,868*
Number of Firms Reporting 261	273	258	272	284
Number of Profitable Firms 158	210	171	178	242
Aggregate Pre-Tax Earnings of Profitable Firms 2,807	4,300	3,482	10,970	18,470
Number of Unprofitable Firms 103	63	87	94	42
Aggregate Pre-Tax Earnings of Profitable Firms (2,183)	(428)	(663)	(3,388)	(989)
3rd Quarter 2001	3rd Quarter 2000	2nd Quarter 2001	Nine Months 2001	Nine Months 2000
Revenues \$43,641	\$59,338	\$50,789	\$152,499	\$183,706*
Expenses 43,018	55,467	47,979	144,918	166,224*
After-Tax Profit/Loss 405	2,516	1,832	4,927	11,362*
After-Tax Annualized Return on Capital 1.1%	7.3%	5.0%	4.5%	11.4%
Assets** 2,680,452	2,342,225	2,562,618	2,680,452*	2,342,225
Capital & Subordinations 150,319*	139,721	146,179	150,319*	139,721
Commission Revenues 6,062	7,415	6,668	20,115	25,868*
Number of Firms Reporting 261	273	258	272	284
Number of Profitable Firms 158	210	171	178	242
Aggregate Pre-Tax Earnings of Profitable Firms 2,807	4,300	3,482	10,970	18,470
Number of Unprofitable Firms 103	63	87	94	42
Aggregate Pre-Tax Earnings of Profitable Firms (2,183)	(428)	(663)	(3,388)	(989)
3rd Quarter 2001	3rd Quarter 2000	2nd Quarter 2001	Nine Months 2001	Nine Months 2000
Revenues \$43,641	\$59,338	\$50,789	\$152,499	\$183,706*
Expenses 43,018	55,467	47,979	144,918	166,224*
After-Tax Profit/Loss 405	2,516	1,832	4,927	11,362*
After-Tax Annualized Return on Capital 1.1%	7.3%	5.0%	4.5%	11.4%
Assets** 2,680,452	2,342,225	2,562,618	2,680,452*	2,342,225
Capital & Subordinations 150,319*	139,721	146,179	150,319*	139,721
Commission Revenues 6,062	7,415	6,668	20,115	25,868*
Number of Firms Reporting 261	273	258	272	284
Number of Profitable Firms 158	210	171	178	242
Aggregate Pre-Tax Earnings of Profitable Firms 2,807	4,300	3,482	10,970	18,470
Number of Unprofitable Firms 103	63	87	94	42
Aggregate Pre-Tax Earnings of Profitable Firms (2,183)	(428)	(663)	(3,388)	(989)
3rd Quarter 2001	3rd Quarter 2000	2nd Quarter 2001	Nine Months 2001	Nine Months 2000
Revenues \$43,641	\$59,338	\$50,789	\$152,499	\$183,706*
Expenses 43,018	55,467	47,979	144,918	166,224*
After-Tax Profit/Loss 405	2,516	1,832	4,927	11,362*
After-Tax Annualized Return on Capital 1.1%	7.3%	5.0%	4.5%	11.4%
Assets** 2,680,452	2,342,225	2,562,618	2,680,452*	2,342,225
Capital & Subordinations 150,319*	139,721	146,179	150,319*	139,721
Commission Revenues 6,062	7,415	6,668	20,115	25,868*
Number of Firms Reporting 261	273	258	272	284
Number of Profitable Firms 158	210	171	178	242
Aggregate Pre-Tax Earnings of Profitable Firms 2,807	4,300	3,482	10,970	18,470
Number of Unprofitable Firms 103	63	87	94	42
Aggregate Pre-Tax Earnings of Profitable Firms (2,183)	(428)	(663)	(3,388)	(989)



It's True!

“An unhappy customer remembers the incident for 23 ½ years and talks about it for 18 months.

White House Office of Consumer Affairs



OBJECTIVES

At the conclusion of this session, you will be able to:

- *Explain what superior customer service is*
- *Identify all your customers*
- *Identify specific process areas you are responsible for expertly managing*
- *Establish a personal Strategic & Tactical Action Plan to improve key relationships and provide “knock your socks off” customer service.*



EXAMPLES



Think of a time when you were most **unhappy** with customer service?

What happened?

11/25/2008



EXAMPLES



Think of a time when you were exceedingly happy with customer service?

What happened?

11/25/2008

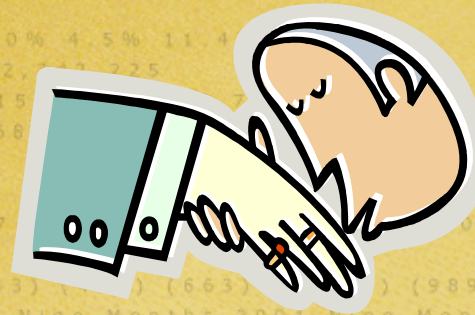
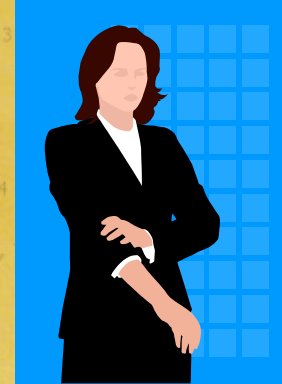
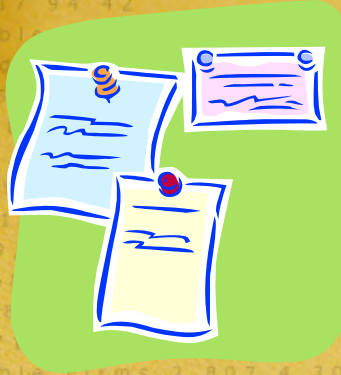
Do We Treat Everyone Same?



Do you treat everyone the same?

What might be some reasons you treat people differently?

What is “Knock Your Socks Off” Service?



11/25/2008

THE CUSTOMER!



If you are NOT serving the customer, your job is to be serving someone who is.

11/25/2008

10



Who Are Your Customers?



Customers are EVERYWHERE

Everyone has a customer

Everyone is a Customer!



Who Are Your Customers?



External customers -- The people who buy your products and service and who are outside of your office or directorate (without them you wouldn't be in business!

Internal customers -- The people who work for your organization. Regardless of whether they are at another location in your building, state, or across the room.

If they depend on you and the work you do in order to complete their own work so they can serve their own customers--they are your customers!



Who Are Your Customers?



How to identify your customer!

1. WHERE DOES MY WORK GO?

2. WHO IS MY WORK IMPORTANT TO?

Your customer is whoever benefits from the work you do—or, conversely, whoever suffers when you work is done poorly or not at all!

11/25/2008



Who Are Your Customers?



My Job is

Critical Tasks I perform:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.

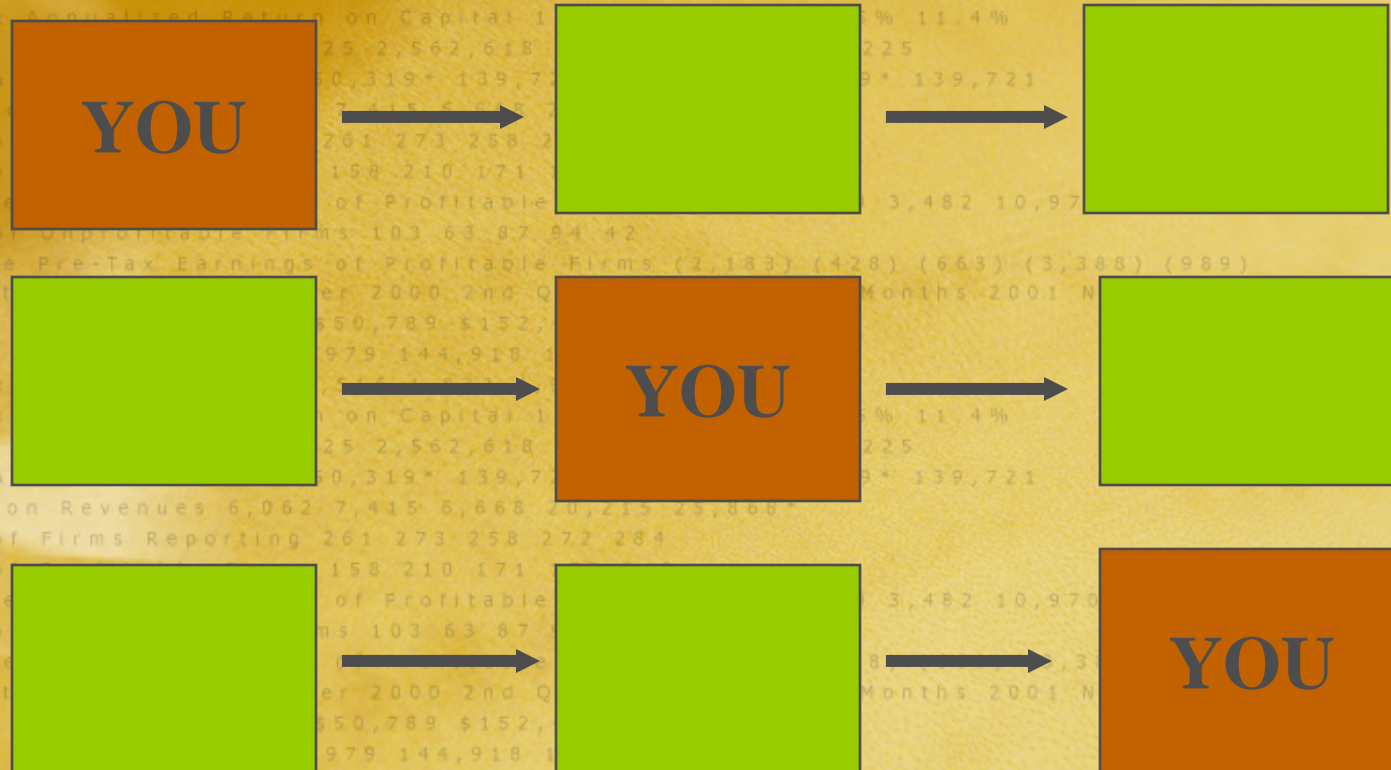
11/25/2008



Who Are Your Customers?



Critical Task #1: (Deliverable)





Who Are Your Customers?



REMEMBER: The people make the place!

A commitment to serve internal customers invariably shows itself to external customers.

It is almost impossible to provide good external service if your organization is not providing good internal service.

VICTIM OF CIRCUMSTANCES?

■ #1 Product Quality Problems

■ #2 Fouled Up Systems & Procedures

■ #3 Work Overload

■ #4 Lack of Job Know-How

■ #5 Co-Workers that Cop-Out

11/25/2008

What do Customers Want?



11/25/2008



What do Customers Want?



SPECIAL TREATMENT

11/25/2008



What do Customers Want?



SPECIAL TREATMENT

RELIABILITY

11/25/2008

20



What do Customers Want?



SPECIAL TREATMENT

RELIABILITY

HIGH QUALITY

11/25/2008